



Job Description – Manager, Investments

White Oak Partners is a growing multifamily real estate investment firm with over \$2.7B AUM. We are looking for a **Manager** to join our growing Investments team. This position works with Leadership responsible for the Acquisitions and Investments team to execute the Company's strategic objectives, and those of our Investors, through identification and analysis of multifamily real estate investment opportunities throughout the U.S. This role will manage the workflow of a team that will gather and analyze financial data to build models, perform sensitivity analysis, and provide investment summaries to Leadership as well as the Investment Committee. This position will be an active participant in the Investment Committee (both advance package preparation and presentations to the IC); and will coordinate with White Oak debt lead in underwriting mortgage debt on acquisitions.

The primary job functions involve, but are not limited to:

Essential Duties

- Remain fully informed of the Company's Strategic Objectives, and those of our active and potential investors; to better/more efficiently source potential acquisition opportunities which align with such Objectives. This will be accomplished through regular meetings and direct interaction with Leadership
- Support management of the acquisition pipeline to track the status of prospective deals. Coordinate with acquisitions team to manage dynamic underwriting priorities. Responsible for team assignments, oversight, and delivery of pro-forma financial model. Monitor and review the tracking and outcome of all archived deals
- Manage the workflow of a team of analysts responsible for building financial models, cost analysis, pro-forma and discounted cash flow models, and investor waterfall structures; contribute to the production of each of these items. Responsible for quality control of the analytics by reviewing work of the team of analysts, where needed
- Identify complex business issues; oversee rigorous and accurate analysis and modeling; ad-Hoc analysis and reporting
- Assimilate and understand market and submarket knowledge for active and prospective target markets
- Manage and review investor Q & A or requests on underwriting detail
- Involvement in communications with brokers, owners, lenders and other professionals
- Manage and coach the team of analysts through ongoing training and development; being mindful of career development for each analyst – consistent with periodic check-in guidance.
- Responsible for mid-year and year-end performance reviews of direct reports
- Support publication of Investment Committee packages and notifications. Participate in review and quality control of materials.
- Direct process improvement and identify new tools and resources: both within current applications and other relevant industry applications. Drive team utilization, training, and implementation to enhance productivity.
- Involvement in review of debt structure options; work with White Oak debt lead and debt broker to obtain market guidance on potential financing alternatives. Coordinate sensitivity analysis of subject deals, as to debt alternatives, to determine those structures that will be most accretive to yield

Note: Nothing in this job description restricts the right for management to assign or reassign duties and responsibilities to this job at any time.

- Support property level diligence by working with the White Oak diligence lead staying apprised of diligence status and issues, and helping manage, coordinate, and review associate's work.
- Manage the underwriting of property level insurance for every deal and thorough vetting of quotes with White Oak's third party. Emphasis on identifying and communicating risks that may change deal economics or delay closing.
- Working closely with the Valuation Committee, Manage quarterly valuation process of owned assets. Review of internal valuations, sales comps and third-party appraisals on a quarterly basis.
- In coordination with the Operations Team, involvement in tracking real estate assessments, appeals, and litigation of owned assets.

Minimum Requirements

The ideal candidate for this position will thrive in a highly entrepreneurial, fast moving environment. This self-starter candidate should be an enthusiastic team player, offer innovative ideas and have the ability manage multiple priorities.

- Advanced knowledge of Excel
- BS/ BA or Master's degree with strong academic and finance background.
- 4-6 years real estate industry financial analysis experience in a supervisory capacity, knowledge of multifamily required
- Conceptual knowledge of core business disciplines including real estate finance, investment principles, corporate finance, and accounting
- Understanding of deal structure
- Advanced problem-solving, analytical and quantitative skills
- Strong oral and written communication skills, able to express ideas and describe information in a clear and concise manner
- Ability to manage, train, and mentor team
- Professional presence to interact with Company Leadership
- Ability to balance multiple projects simultaneously with demanding deadlines in a small team environment
- Ability to work effectively with diverse personalities to accomplish objectives
- Must possess initiative, resourcefulness, strong attention to detail, and be reliable
- Travel requirements: travel could be moderate dependent on deal flow